# Weekly Team Emails

# **Week 2—Team-Leader-to-Team Email**

**Email Highlights:**

**—Completing the Key Factors Worksheet and Independent Analysis (IA) by 7/xx**

**—Completing Your IA Scorebook by 7/xx**

**—Reviewing the Elements of a Complete IA Scorebook**

Hello, team, and welcome to the 2nd week of the virtual evaluation process. It was great meeting you on our 1st Planning Call last week. Please note the following:

* We agreed that each of you will complete a Key Factors Worksheet and Independent Analysis (IA)Worksheet for items x.x and 7.x by 7/xx. Please remember to email me and (coach’s name) when these are complete.
* I will meet my commitment and provide feedback on your x.x and 7.x Worksheets by 7/xx. I will email you when I have completed my feedback, or I will call you to discuss the feedback on your items.
* In the meantime, I encourage you to continue evaluating the applicant. **You do not need to wait for my feedback or (coach’s name) to proceed with your evaluation.**
* If you have not already done so, please upload your bio to Bridge in the team files area. A blank template for this information is available on the Examiner Resource Center reference shelf. I will use this information to plan assignments for Item Consolidation.
* Your IA Scorebook must be completed by the deadline for you to remain on the team. A complete IA Scorebook includes the following:
* Conflict of Interest Determination Worksheet
* Key Factors Worksheet
* 17 Item Worksheets
* As you complete your IA, please make note of potential key theme(s) [topics]. I will consolidate everyone’s inputs into one list that will then be used to draft the key themes.
* Please remember to email me when you have completed your IA Scorebook and be sure to mark your IA scorebook “Complete” in Bridge.
* Please make sure that you schedule enough time to provide a full evaluation of the applicant, typically between 40 - 50 hours. The complete IA Scorebook is scheduled to be completed in Bridge by x/xx, and our 2nd planning call is scheduled for Day of the Week, x/xx, xx:xx a.m./p.m., ET. For your convenience, I’ve included **or** attached the calling instructions.

Finally, if you have any questions about the process or the Criteria, please review the “Evaluating MBNQA Applicants” process document or feel free to contact me at (phone/email) or If I am not available to answer your questions, please contact (coach’s name/phone/email). Remember, until we have all completed our independent evaluations, we may not have any discussions concerning the applicant.

**Week 3 – Team-Leader-to-Team Email**

**Email Highlights:**

**—Reviewing the Elements of a Complete IA Scorebook**

**—Participating on the 2nd Planning Call Scheduled on 7/xx**

**—Begin *Step 2: Consolidate Items***

As you continue your evaluation of the applicant, I want to remind you of the following:

* Our 2nd planning call is scheduled for Day of the Week, x/xx, 00:00 a.m./p.m., ET. For your convenience, I’ve included **or** attached the calling instructions. Please have the attached materials, as well as your business and personal calendars, on hand for this planning call. You may also wish to review the “Step 2: Consolidate Items” module in Rise and / or review the “Evaluating MBNQA Applications” document I sent you last week.
* Once all IA Scorebooks are marked as complete in Bridge, I will be able to build the consolidated Key Factors Worksheet; I will do soby our agreed-upon timeline of xx/xx. **Please review the draft consolidated Key Factors Worksheet in Bridge in advance of our 2nd planning call.** This version will be the basis for our Key Factors Worksheet discussion.
* Following the 2nd planning call you will begin item consolidation (step 2) for the items you are assigned. Remember, until we have all completed our independent evaluations, we may not have any discussions concerning the applicant.

**Week 4 – Team-Leader-to-Team Email**

**Email Highlights:**

**—Begin *Step 2: Consolidate Items***

As you continue your evaluation of the applicant, I want to remind you of the following:

* Our 2nd planning call is scheduled for Day of the Week, x/xx, 00:00 a.m./p.m., ET. For your convenience, I’ve included **or** attached the calling instructions. Please have the attached materials, as well as your business and personal calendars, on hand for this planning call.
* The goals of this call are:

a. To ensure understanding of the process to be followed for planning and conducting the

Applicant Interview calls by reviewing the process tasks and timeline, including Bridge if needed.

b. Address any outstanding concerns the team has regarding the observations or “Findings.”

Note: It is NOT necessary to reach consensus on observations or “Findings” on this call.

c. Review the call schedule agreed upon with the applicant’s Official Contact Point (OCP).

* **Here is our agenda for the 2nd planning call:**
* Welcome and Check-in (how is this team doing)
* Review the process documentation for “Step 2: Consolidate Items” step and the timeline.
* Overview the remainder of steps through the end of Virtual Evaluation phase to ensure team members have a basic understanding of the process.
* Review team assignments (Item Lead, Item Backup, Key Themes Lead (if designated), Scorebook Editor, Scorekeeper.
* As a reminder, please complete your IC worksheets and open for R-1 by our agreed-upon deadline of xx/xx. Item Leads, please remember to open the feedback pane in Bridge so that the rest of the team can provide their feedback on your IC worksheets.
* By xx/xx, everyone should have reviewed all items and provided feedback to the item lead in Bridge.

**Week 5—Team-Leader-to-Team Email**

**Email Highlights:**

**—Item Leads complete revision of IC Worksheets and open for R-2 by Team’s Deadline**

**—R-2 closes**

**—Participating on the 3rd Planning Call Scheduled on xx/xx xx:xx a.m./p.m., ET**

**—Reviewing the Attached 3rd Planning Call Agenda**

Team,

* Please finish your 2nd drafts of assigned items by our team’s agreed-upon deadline of xx/xx,.
* By xx/xx, everyone should have reviewed all Item Leads’ worksheets, and made notes on any Items that are still of concern in preparation for the 3rd planning call.
* The 3rd planning call is scheduled to take place on xx/xx at 00:00 a.m./p.m., ET. We will discuss the upcoming virtual interviews with the applicant and how to prepare, along with any remaining concerns with the Item Consolidation (IC) worksheets. We will also revisit our process timeline, so please have your business and personal calendars available so that we can make any needed adjustments. **The materials and instructions to prepare for the 3rd planning call, as well as the agenda, are included in the attachment.**

**Week 6—Team-Leader-to-Team Email**

**Email Highlights:**

**—3rd Planning Call**

**-- Begin *Step 3: Prepare for Virtual Interviews***

Team,

It’s been a busy week. Please note the following:

* The 3rd planning call is scheduled to take place on xx/xx at 00:00 a.m./p.m., ET. We will discuss the upcoming virtual interviews with the applicant and how to prepare, along with any remaining concerns with the Item Consolidation (IC) worksheets. We will also revisit our process timeline, so please have your business and personal calendars available so that we can make any needed adjustments.
* Also in preparation for the 3rd Planning Call, please review “Step 3, Prepare for Virtual Interviews”. You may also wish to review the Bridge software online training module, specifically the Applicant Interview Worksheet, located in RISE.
* Item Leads begin preparing for your applicant interviews by completing you Applicant Interview Worksheets. The agreed upon deadline for completion of those worksheets is x/xx.

**Week 7—Team-Leader-to-Team Email**

**-- Continue Work on Applicant Interview Worksheets**

**-- Prepare for 4th Planning Call**

**Team,**

* Just a reminder to complete your Applicant Interview Worksheets by x/xx.
* Our 4th Planning Call is scheduled for xx/xx at 00:00 a.m./p.m., ET. Item leads will review their strategy for collecting needed information on the calls using their Applicant Interview Worksheets. Team members will ask questions to clarify these strategies, and to provide feedback/suggestions. We do not need to reach consensus on these worksheets. Item Leads will then finalize their worksheets based on any feedback received. Item Leads will also review those observations needing no additional information that will move onto the Virtual Item (VE) Worksheets. After this review, the team must agree on the overall strategy for obtaining needed information.
* We will also discuss the Applicant Interview Guidelines in Step 4 of the “Evaluating MBNQA Applications” document. Please look this over in advance. We will also review the interview schedule to make sure we are all in synch.
* Item Leads, please let me and (coach’s name) know when you have completed your Applicant Interview Worksheets.

**Week 8—Team-Leader-to-Team Email**

**Email Highlights:**

**—Finalize Applicant Interview Worksheets   
—Conduct 4th Planning Call**

Team,

Our 4th Planning Call is scheduled for xx/xx at 00:00 a.m./p.m., ET. Our agenda is:

* Welcome and Check-in (how is this team doing)
* Ground Rules for Meeting: As Item leads review their Applicant Interview Worksheets and talk about those observations passing through to the VE Item Worksheets, the goal here is for team members to ask questions to clarify or provide helpful information. No judgement and no arguing here. There is no need to reach consensus on observations. However, the team should review and agree on the overall strategy for obtaining information as efficiently as possible.
* Each Item Lead, in round robin order, reviews the interview strategy using the Applicant Interview Worksheet. Each Item backup takes notes on any contributions by the team members.
* Address any outstanding concerns the team has regarding observations or “Findings.”
* Team discusses emerging potential Key Themes, and captures notes in **Bridge** on the Key Themes Worksheet.
* Team Leader reviews virtual interview techniques – do’s and don’ts (see below)
* Team Leader reviews call logistics, including the schedule and who will be present for the Category meetings.

**Week 8/9—Team-Leader-to-Team Email**

**Email Highlights:**

**—Conduct Virtual Interviews with Applicant**

**—Begin *Step 5: Draft VE Item Worksheets***

**—Complete drafts and open for R-1**

Team,

Here are a few reminders:

Our applicant interview calls are coming up soon. The dates and times of the calls are xx/xx, 00:00 a.m./p.m., ET, and xx/xx, 00:00 a.m./p.m., ET. See the Applicant Interview Schedule attached.

Please re-read the Applicant Interview Guidelines.

After your interviews are complete and Item Backups have placed their notes in Bridge, Item Leads do your first draft of your VE Item Worksheets. After you complete your drafts let the team know when they are open for feedback (R-1 again). Also let me and (coach’s name) know.

If you have any questions or concerns during these interviews, please contact me by (phone/text) or (coach’s name) at (coach’s phone/email/text)

**Week 10—Team-Leader-to-Team Email**

**Email Highlights:**

**—Team members review and provide feedback (R-1 continued)**

**—R-1 Closes and Item Leads incorporate feedback**

**—Item Leads Complete R-1 Revisions and Open for R-2**

**—Prep for Consensus Call**

Team,

Here are a few reminders:

By now Item Leads should have finished drafting their VE Item Worksheets and are ready to open them up for feedback if you haven’t already done so

As a reminder, our consensus call (R-2) is coming up soon. The date and time of the calls is xx/xx, xx:xx a.m./p.m.,. Please review and be prepared to discuss **all** item findings, scores, and key themes.

In preparation for the consensus call, finalize your “call scripts” for each of your items.

Call scripts for item leads are to be completed by xx/xx. The template can be found in the Examiner Resource Center.. These scripts contain the talking points for your assigned items. My item x.x script is available for your review in the Bridge team files section as an example of what we need to cover on the call(s).

If you have any questions about the process, the Criteria, or the Consensus Review Worksheets, please review the “Step 6: Finalize Item Worksheets,” and feel free to contact (coach’s name) at (phone/email).

**Week 11—Team-Leader-to-Team Email**

**Email Highlight:**

**—Team Members Provide Feedback**

**—Item Leads Incorporate Feedback**

**—Conduct Consensus Call, Scheduled on xx/xx, xx:xx a.m./p.m., ET , and xx/xx, xx:xx a.m./p.m., ET**

**—Complete *Step 6: Finalize VE Worksheets***

Team,

Well, folks, we are nearing the end of the game.

Following are some reminders about our agreed-upon deadlines:

* Our consensus call(s) is scheduled for xx/xx and xx:/xx a.m./p.m., ET. I’ve attached or included the calling instructions.
* Remember to notify team members via email as work is completed in Bridge.
* All R-3 feedback must be completed by xx/xx.
* If you have not already done so, complete the call scripts for the items you are leading by xx/xx. A template can be found in the Examiner Resource Center

If you have any questions at this point, particularly about the Criteria or the consensus call process, please contact me at phone/email or (coach’s name).

I am looking forward to our call(s) this/next week.

**Week 12—Team-Leader-to-Team Email**

**Email Highlight:**

**—Item Leads Incorporate R-3 Feedback**

**—Marking Items Complete**

**—Finalize Key Themes (Step 7)**

**—Finalizing the Scorebook (Step 8)**

Team,

Thank you all for the great call we had last week! This email is intended to remind you to have all revisions to your Item Worksheets (incorporating R-3 feedback) completed in Bridge by xx/xx. When you have finished the worksheets, please mark each of them “complete” in Bridge.

We will finalize Key Themes…

The scorebook editor and I will review the entire scorebook one more time after all items have been marked complete. Then, the scorebook will be marked final (yay!).

Thank you all for your hard work! I have enjoyed working with you and take pride in knowing that we will be providing very valuable feedback for this applicant.